**WEST LOTHIAN COUNCIL**

**Dealing with Death in Service – A Managers Guide**

Sadly, there are times when colleagues pass away, and we know you’ll want to deal with these situations sensitively and professionally. So, we’ve created this guide to help you as you support your team and the colleague’s family and make sure all the necessary admin arrangements are carried out.

If the colleague had more than one job at the council, the manager of their primary role (the one with most hours) should manage the Death in Service process to avoid any confusion as to who is taking care of the arrangements. If that’s you, you’ll need to keep the other manager(s) up to date with the process.

We know you may find dealing with a colleague’s death difficult and you or your team might want to talk to someone about the events. You or your team can contact the council’s Employee Assistance Programme 0800 0285 148 free 24 hours a day. For practical support in relation to the necessary administration and actions noted below, contact HR Support on Hrsupport@westlothian.gov.uk

**Actions Necessary**

**1) Initial Response**

These actions should normally be undertaken on the day you are made aware of the colleague’s death or the following day if not practicable.

* Firstly, please notify your immediate line manager of the employee’s death. A letter of condolence is normally sent by the Head of Service to the bereaved family of the employee.
* Inform your team of the employee’s death - Make sure you use an up to date list of team members to identify everyone who needs to be informed. Consider how best to contact your team given remote working patterns. In person contact is best if possible. If you are the only manager within the service area, is there someone who can assist you with this task – team members likely to prefer to hear from someone they know.
* Access the deceased employee’s online diary to see if there are any key appointments needing cancelled and people notified.
* The line manager should ensure a brief communication is sensitively prepared and sent to other teams who may need to know
* Contact [Hrsupport@westlothian.gov.uk](mailto:Hrsupport@westlothian.gov.uk), and submit a **Death in Service form** providing the following information to ensure any payments in process are stopped:
  + Name and employee number of the deceased colleague
  + Date of the colleague’s death
  + Date of last day colleague worked
  + Service manager who will be the main contact for HR queries
  + Contact details of employee’s next of kin/executor of the will.

There is also **a checklist for when people leave** employment that will helpful in identifying the tasks that need to be progressed.

* Contact the IT Help Desk on 01506 282828 and advise them of the circumstances so they can help you manage the situation sensitively and provide practical advice in relation to the employee’s email account. You will need access to the deceased employee’s account to check on any business critical communications. You should also request an out of office message to be added to the email account – A generic statement will be best so as not to inform people of a colleague’s death by out of office message. This wording might be helpful *“This account is no longer in use. If your enquiry needs a reply, please forward it to ……….*
* Inform the Corporate Communications Team (emailing Media) of the death as there may be interest out with the council

**2. Support for People**

* Support for yourself – Managing the death of a member of your team will be an extremely challenging time for you as a manager. Ensure that you prioritise your own wellbeing and seek support from colleagues within the work place to help you at this time. It will be important that you feel well supported in order to enable you to support others.
* It’s not unusual for people to experience shock, sadness and sometimes anger when told of a colleague’s death. We need to provide support for these colleagues to help them in this difficult time.
* Plan how to provide the team with an opportunity to meet together in person at the earliest opportunity to provide peer support. If some team members are unable to attend, plan in time to catch up with them individually in-person or on Teams.
* Managers should share appropriate information with close colleagues in a timely manner. Communicate information to employees who are temporarily away from work e.g. on holiday or on maternity leave, where it is thought to be appropriate.
* Remember that many colleagues may want to attend the funeral to pay their respects – so talk to them about this and agree what can be accommodated. If the colleague had more than one council job, you should make their other manager(s) aware of the funeral arrangements so they can discuss with any other colleagues who may want to attend. Refer to the Special Leave Procedure or contact HR.
* Remember we have an [Employee Assistance Programme (EAP)](https://intranet.westlothian.gov.uk/media/29433/Help-EAP-Brief/pdf/Help_EAP_Service.pdf?m=1593163218237)who can provide colleagues with support. You may want to contact EAP directly to let them know that a colleague has died and that they may get calls from a number of colleagues seeking support. HR Policy & Advice Team would be able to assist with this.
* In some circumstances it may be appropriate to provide the support of an experienced trauma counsellor. If you think this would be help, you should contact HR Policy & Advice Team and they can liaise with EAP services initially to arrange this.

**3. Service Delivery**

It is important that a plan is established to manage the workload of the colleague who has passed away. This should be dealt with sensitively and unless it is absolutely necessary to deal with this immediately it should be left for a few days until people have got over the initial shock.

* Consider how the workload of the person will be best managed until future plans are confirmed.
* Consider how priority tasks can be shared across the existing team.
* Provide clear information on the changes as soon as possible to the team and to “customers.”
* Consideration should also be given to the needs of clients, e.g. a need to support school pupils in the event of the death of a teacher, or care home residents in the event of the death of a carer. Support to others who are affected by a bereavement can be sought from external organisations that specialise in this area, some are listed below:

Other Resources

* Cruse Bereavement Care: [www.cruse.org.uk](https://www.cruse.org.uk/), 0808 808 1677
* Cruse Bereavement Care Scotland: [www.crusescotland.org.uk](https://www.crusescotland.org.uk/), 0845 600 2227
* Bereavement Advice Centre: [https://bereavementadvice.org](https://bereavementadvice.org/), 0800 634 9494 0800 634 9494
* Macmillan Cancer Support: [www.macmillan.org.uk](https://www.macmillan.org.uk/), 0808 808 00 00

**4. Dealing with next of kin**

The council should assign a single point of contact for the next of kin to avoid confusion at a distressing time. At an appropriate time, this person will need to deal with questions, provide information and assist with what will be sensitive matters including:

* establishing when the funeral is to take place and asking whether colleagues of the deceased are welcome to attend.
* advising colleagues about letters of condolence, floral and other tributes
* arranging for personal possessions to be forwarded or collected and for the return of any departmental equipment, ID badge, etc.
* providing information about outstanding salary payments and death-in-service benefits

[Personal items](https://hr.admin.ox.ac.uk/death-in-service#collapse1368331)

It is best not to deal with any personal items left at work too hurriedly and to be sensitive to the wishes of the next of kin: they may wish to come and collect these personally, or may prefer for them to be sent to them.

**5. Death in Service Administration**

* When completing the Death in Service form include any outstanding leave, or any other outstanding payments such as overtime. You should also discuss with Payroll whether there are any salary advances, salary sacrifice arrangements, loan repayments (such as student loans), or statutory payments in process (i.e. maternity pay) which needs to be considered before a final payment is agreed. HR Support will liaise with payroll to obtain final balances to be paid once HR Support receive the Death Certificate
* Once informed of a death, banks will normally freeze accounts, including joint accounts.  The final payment is therefore usually made to the “representatives of the estate”, If you are the single point of contact you should clarify this with the next of kin or ensure Payroll are undertaking that task. Salary payments will be subject to normal tax deductions, but not Class 1 National Insurance Contributions.
* HR Support will obtain a copy of the Will and if no Will the next of kin will be asked to complete a disclaimer form if they wish to accept the money. HR Support pass over the next of kin bank details for the payment to be made by bank transfer which is arranged by payroll
* HR Support will confirm whether the employee is a pension scheme member. Payroll will then complete the death in service pension form for Lothian Pension Fund (LPF) and forward to them. For Scottish Public Pensions Agency (SPPA). HR Support will forward the appropriate form to the next of kin to complete and return, this is sent out with a letter from HR Support. HR Support complete the Death in Service form Section 1 and 2, then pass to payroll to complete the relevant section, thereafter payroll will pass the form to SPPA. Information on estimates regarding financial issues or timescales should not be given unless confirmed through Payroll/Pension/SPPA.

**Death in Service Form**

**Title Forename Surname Employee No.**

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
|  |  | |  | | |  |
| **Service Area** | |  | | **Post Title** |  | |

**Service Manager (main point of contact for HR)**

|  |  |  |  |
| --- | --- | --- | --- |
| **Name** |  | **Email address** |  |
| **Phone No** |  | | |

**Next of Kin Details**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Name** |  | | **Email address** |  |
| **Address** |  | | | |
|  | | | | |
| Phone Nunber | |  | | |
| **Relationship to the deceased** | |  | | |

**Annual leave**

|  |  |  |  |
| --- | --- | --- | --- |
| **Leave to be paid** |  | **Leave to be deducted** |  |

**HR Support use only**

|  |  |
| --- | --- |
| **Confirmation of Date of Death** |  |

**Authorised by:**

|  |  |  |  |
| --- | --- | --- | --- |
| PRINT Name: |  | Position: |  |

|  |  |  |  |
| --- | --- | --- | --- |
| Signed: |  | Date: |  |

**Please ensure form is correctly completed and submitted to** hrsupport@westlothian.gov.uk